

## Refine Search

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### Search Results -

Term	Documents
705/26	4116
705/26S	0
705/27	1370
705/27S	0
((705/27.CCLS.) OR (705/26.CCLS.)).PGPB,USPT,USOC.	4991
(705/26.CCLS. OR 705/27.CCLS. ).PGPB,USPT,USOC.	4991

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<b>Database:</b>	US Pre-Grant Publication Full-Text Database US Patents Full-Text Database US OCR Full-Text Database
<b>Search:</b>	EPO Abstracts Database JPO Abstracts Database Derwent World Patents Index IBM Technical Disclosure Bulletins
L11	<input type="button" value="Refine Search"/>
<div style="display: flex; justify-content: space-around;"> <input style="border: 1px solid black; padding: 2px; width: 100px; height: 20px; margin: 2px;" type="button" value="Recall Text"/><input style="border: 1px solid black; padding: 2px; width: 100px; height: 20px; margin: 2px;" type="button" value="Clear"/><input style="border: 1px solid black; padding: 2px; width: 100px; height: 20px; margin: 2px;" type="button" value="Interrupt"/> </div>	

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### Search History

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**DATE:** Friday, October 28, 2005    [Printable Copy](#)    [Create Case](#)

<u>Set</u>	<u>Name</u>	<u>Query</u>	<u>Hit Count</u>	<u>Set</u>
<u>Name</u>	<u>result set</u>		<u>Name</u>	<u>result set</u>
side by side				
DB=PGPB,USPT,USOC; PLUR=YES; OP=OR				
L11 705/26.ccls. or 705/27.ccls.	4991	L11		
DB=EPAB,JPAB,DWPI,TDBD; PLUR=YES; OP=OR				
L10 L9 SAME (gift or present or (third ADJ party) or recipient)	23	L10		
L9 L8 SAME (deliver\$3 or shipment or shipping or ship or shipped or address)	488	L9		
L8 (order\$3 or purchas\$3 or buy\$3) NEAR9 merchandise	2904	L8		
DB=PGPB,USPT,USOC; PLUR=YES; OP=OR				
L7 L6 and @PD>20050615	153	L7		

<u>L6</u>	L5 SAME (deliver\$3 or shipment or shipping or ship or shipped or address) SAME (gift or present or (third ADJ party) or recipient)	1805	<u>L6</u>
<u>L5</u>	(order\$3 or purchas\$3 or buy\$3) NEAR9 (product or item or goods)	262560	<u>L5</u>
<u>L4</u>	(buying NEAR9 merchandise) SAME (deliver\$3 or shipment or shipping or ship or shipped or address) SAME (gift or present or (third ADJ party) or recipient)	2	<u>L4</u>
<u>L3</u>	L2 SAME (gift or present or (third ADJ party) or recipient)	137	<u>L3</u>
<u>L2</u>	L1 SAME (deliver\$3 or shipment or shipping or ship or shipped or address)	1362	<u>L2</u>
<u>L1</u>	(order\$3 or purchas\$3 or buy) NEAR9 merchandise	5181	<u>L1</u>

Search  
through,  
KWIC  
& DATE

END OF SEARCH HISTORY

*NVR*

*10/28/2005*

File 756:Daily/Sunday Telegraph 2000-2005/Oct 28  
(c) 2005 Telegraph Group  
File 757:Mirror Publications/Independent Newspapers 2000-2005/Oct 28  
(c) 2005  
File 387:The Denver Post 1994-2005/Oct 26  
(c) 2005 Denver Post  
File 471:New York Times Fulltext 1980-2005/Oct 28  
(c) 2005 The New York Times  
File 492:Arizona Repub/Phoenix Gaz 19862002/Jan 06  
(c) 2002 Phoenix Newspapers  
File 494:St LouisPost-Dispatch 1988-2005/Oct 27  
(c) 2005 St Louis Post-Dispatch  
File 498:Detroit Free Press 1987-2005/Sep 02  
(c) 2005 Detroit Free Press Inc.  
File 631:Boston Globe 1980-2005/Oct 27  
(c) 2005 Boston Globe  
File 633:Phil.Inquirer 1983-2005/Oct 26  
(c) 2005 Philadelphia Newspapers Inc  
File 638:Newsday/New York Newsday 1987-2005/Oct 27  
(c) 2005 Newsday Inc.  
File 640:San Francisco Chronicle 1988-2005/Oct 28  
(c) 2005 Chronicle Publ. Co.  
File 641:Rocky Mountain News Jun 1989-2005/Oct 28  
(c) 2005 Scripps Howard News  
File 702:Miami Herald 1983-2005/Oct 26  
(c) 2005 The Miami Herald Publishing Co.  
File 703:USA Today 1989-2005/Oct 27  
(c) 2005 USA Today  
File 704:(Portland)The Oregonian 1989-2005/Oct 27  
(c) 2005 The Oregonian  
File 713:Atlanta J/Const. 1989-2005/Oct 27  
(c) 2005 Atlanta Newspapers  
File 714:(Baltimore) The Sun 1990-2005/Oct 28  
(c) 2005 Baltimore Sun  
File 715:Christian Sci.Mon. 1989-2005/Oct 28  
(c) 2005 Christian Science Monitor  
File 725:(Cleveland)Plain Dealer Aug 1991-2005/Oct 27  
(c) 2005 The Plain Dealer  
File 735:St. Petersburg Times 1989- 2005/Oct 27  
(c) 2005 St. Petersburg Times

Set	Items	Description
S1	294495	((ORDER??? OR PURCHASE?? OR BUY???) (9N) (PRODUCT OR PRODUCTS OR ITEM OR ITEMS OR GOODS OR MERCHANDISE)) (S) (DELIVER??? OR - SHIPMENT? ? OR SHIPPING OR SHIP OR SHIPS OR SHIPPED OR ADDRESS OR ADDRESSES)
S2	18508	S1(S) (GIFT OR GIFTS OR PRESENT OR PRESENTS OR (THIRD(W) (PA- RTY OR PARTIES)) OR RECIPIENT OR RECIPIENTS)
S3	3666	S2 AND PY<1999
S4	2732	RD (unique items)
S5	745	S1(S) (COMPUTER? ? OR INTERNET? ? OR WEB OR WEBS OR WEBSITE? ? OR WEBPAGE? ? OR ONLINE OR ECOMMERCE OR (ELECTRONIC(W) COMM- ERCE)) AND S4

searched  
through

I/o error messages when I tried to send further

NVR  
10/28/2005

```
? show files; ds
File 15:ABI/Inform(R) 1971-2005/Oct 28
      (c) 2005 ProQuest Info&Learning
File 9:Business & Industry(R) Jul/1994-2005/Oct 26
      (c) 2005 The Gale Group
File 610:Business Wire 1999-2005/Oct 28
      (c) 2005 Business Wire.
File 810:Business Wire 1986-1999/Feb 28
      (c) 1999 Business Wire
File 275:Gale Group Computer DB(TM) 1983-2005/Oct 27
      (c) 2005 The Gale Group
File 476:Financial Times Fulltext 1982-2005/Oct 28
      (c) 2005 Financial Times Ltd
File 624:McGraw-Hill Publications 1985-2005/Oct 28
      (c) 2005 McGraw-Hill Co. Inc
File 636:Gale Group Newsletter DB(TM) 1987-2005/Oct 27
      (c) 2005 The Gale Group
File 621:Gale Group New Prod.Annou.(R) 1985-2005/Oct 28
      (c) 2005 The Gale Group
File 613:PR Newswire 1999-2005/Oct 28
      (c) 2005 PR Newswire Association Inc
File 813:PR Newswire 1987-1999/Apr 30
      (c) 1999 PR Newswire Association Inc
File 16:Gale Group PROMT(R) 1990-2005/Oct 27
      (c) 2005 The Gale Group
File 160:Gale Group PROMT(R) 1972-1989
      (c) 1999 The Gale Group
File 634:San Jose Mercury Jun 1985-2005/Oct 27
      (c) 2005 San Jose Mercury News
File 148:Gale Group Trade & Industry DB 1976-2005/Oct 28
      (c) 2005 The Gale Group
File 20:Dialog Global Reporter 1997-2005/Oct 28
      (c) 2005 Dialog
File 35:Dissertation Abs Online 1861-2005/Oct
      (c) 2005 ProQuest Info&Learning
File 583:Gale Group Globalbase(TM) 1986-2002/Dec 13
      (c) 2002 The Gale Group
File 65:Inside Conferences 1993-2005/Oct W4
      (c) 2005 BLDSC all rts. reserv.
File 2:INSPEC 1898-2005/Oct W3
      (c) 2005 Institution of Electrical Engineers
File 474:New York Times Abs 1969-2005/Oct 27
      (c) 2005 The New York Times
File 475:Wall Street Journal Abs 1973-2005/Oct 27
      (c) 2005 The New York Times
File 99:Wilson Appl. Sci & Tech Abs 1983-2005/Sep
      (c) 2005 The HW Wilson Co.
File 256:TecInfoSource 82-2005/Jan
      (c) 2005 Info.Sources Inc
File 47:Gale Group Magazine DB(TM) 1959-2005/Oct 28
      (c) 2005 The Gale group
File 570:Gale Group MARS(R) 1984-2005/Oct 27
      (c) 2005 The Gale Group
File 635:Business Dateline(R) 1985-2005/Oct 28
      (c) 2005 ProQuest Info&Learning
File 477:Irish Times 1999-2005/Oct 28
      (c) 2005 Irish Times
File 710:Times/Sun.Times(London) Jun 1988-2005/Oct 27
      (c) 2005 Times Newspapers
File 711:Independent(London) Sep 1988-2005/Oct 28
      (c) 2005 Newspaper Publ. PLC
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DIALOG(R)File 636:Gale Group Newsletter DB(TM)  
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03539190 Supplier Number: 47313930 (THIS IS THE FULLTEXT)

**INDUSTRY BRIEFS: FDC Speeds Approval Process**

Credit Risk Management Report, v7, n7, pN/A

April 21, 1997

TEXT:

As competition for cardholders becomes more fierce, First Data Bankcard Program Services of Atlanta, created a system for bank card issuers to approve card applications in seconds. The Credit Enhanced System automates many functions previously performed manually. The system can acknowledge when data entered for each **application** is **complete** and cross-reference different sources of information. It also includes a missing **information** default to highlight **incomplete** applications and generate a letter to the applicant detailing additional information needed. (Nancy Etheredge, FDC, 402/222-5553.)

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03576923 Supplier Number: 47404044 (THIS IS THE FULLTEXT)  
**3COM: 3Com announces winners of the first annual Retail Network Innovation Awards**

M2 Presswire, pN/A  
May 22, 1997

TEXT:

M2 PRESSWIRE-22 May 1997-3COM: 3Com announces winners of the first annual Retail Network Innovation Awards (C)1994-97 M2 COMMUNICATIONS LTD

RDATE:200597

\* Judging panel includes leading retail industry information technology professionals

3Com Corporation (NASDAQ: COMS), the leader in providing retailers with end to end network solutions that span the retail enterprise from the point-of-sale to retail intranets, today announced the winners of the first annual Retail Network Innovation Awards (RNIA), recognizing the creative use of information networks for competitive advantage and consumer benefit in retail environments.

The RNIA awards, founded by 3Com, together with co-sponsors Informix Software, Telxon, Siemens Nixdorf, Tandem, and RT Magazine, were presented to the winners Tuesday evening during a ceremony at the Chicago Museum of Science and Industry in conjunction with the Retail Systems '97 conference.

"Network technology and infrastructure are becoming superconductors for innovation in retailing," said 3Com Chairman and CEO Eric Benhamou, who delivered the awards' keynote address. "Retailers are using networks to gain competitive advantage, break down boundaries in the traditional supply chain,, and create new opportunities for their customers."

The RNIA's recognize achievement and innovation in seven separate retail networked application categories. The categories and the winners for 1997 are:

Wireless In-Store Network -- Federated Department Stores (New York)

In order to expedite check out times during peak shopping seasons, Federated Department Stores deployed a wireless application to augment the traditional register. While a customer is in line, the application captures all necessary sales data. The transaction is then suspended until the customer reaches the register, when it is automatically retrieved for tendering. The technology allowed Federated Department Stores to significantly reduce customer check-out times, lower the installed register base and redistribute newer point-of-sale technology throughout all store locations without additional capital investment.

Mass Customization Network -- American Greetings (Cleveland)

American Greetings provides an **online** ordering system that enables a customer to select, personalize, and **order** greeting cards and other **gift items**. The **Internet** -based applications also feature an **address book** that holds **recipient addresses** and a reminder system that provides advance notice of important, upcoming occasions. **Products** can be **ordered** in advance and they will be automatically mailed to arrive on the appropriate date. The application has created a new channel of distribution that establishes a relationship with **Internet** customers while maintaining the traditional in-store sales base.

Supply Chain Networks -- Wal-Mart Stores, Inc. (Bentonville, Ark.)

A major opportunity for the retail industry is to improve forecast accuracy, eliminate uncertainty in purchasing and production plans, and eliminate the costs created by these uncertainties. Leading companies from multiple industry sectors were invited to participate in the Collaborative Planning Forecasting and Replenishment (CPFR) initiative. The forecasting planning horizons range from three days to as much as 12 days or more. The CPFR application will enable a retailer's inventory management group to work with larger numbers of suppliers to share forecasting information. It

will enable a supplier's demand/manufacturing planning group to work with larger numbers of retailers to share planned promotions, inventory constraints, etc. Working together, they can create more accurate forecasting information than either could generate alone. More accurate forecasts lead directly to decreased costs, improved efficiency, and lower prices to consumers.

Retail Call Center Networks -- Chadwicks of Boston (Boston)

Through a robust ATM network, sales associates at Chadwicks catalog sales call center have access to online catalog imaging, product information, and ordering capability, eliminating virtually all paperwork from the ordering process. The application also recommends add-on merchandise to complement the customer's order, and will offer substitute merchandise if a particular item is not in stock. The network integrates telephony, with images and traditional data to create a more enriched selling environment for sales associates when speaking with customers. It creates a competitive advantage by improving customer service, reducing lengths of calls, supporting large volume during peak sales periods, and maximizing order value for each sale.

Wired In-store Network -- Carnival Cruise Lines (Miami)

Through a feature-rich, scalable ATM backbone with switched Ethernet to all points-of-sale and desktop workstations, Carnival Cruise Lines offers its passengers a comprehensive reservation system, an onboard charge system, and interactive TV in the cabin that delivers multimedia entertainment, video conferencing, previews and reservations of shore excursions, ship events, digitized on demand movies, and online room service orders. To maximize guest convenience, all services including shore tours, gift shop **merchandise**, and bar **purchases** are transacted on a cashless basis via a "Sail and Sign" card charged to the guest account on the property management system. The network improves customer service by extending the point-of-sale to the guest cabin -- eliminating lines for shore excursion reservations and distributing the point-of- purchase in the restaurants so waiters can send food orders to the kitchen from the dinning room and spend more time serving customers.

Electronic Commerce -- OfficeMax (Akron, Ohio)

OfficeMax developed a multi-faceted approach with common leverage of both private and public network infrastructures. For its larger corporate customers, OfficeMax developed an Internet-based custom purchasing system called OfficeMax Corporate Direct which is supported by a dedicated national sales force. For the small office/home office (SO/HO) and consumer segments, OfficeMax developed a new interactive CD-ROM catalog with over 7,000 items, an instant updating feature for both products, and pricing and convenient electronic ordering. In addition, OfficeMax also offers its customers access to the OfficeMax OnLine Internet site which contains the complete assortment of OfficeMax merchandise, secure electronic ordering and many other features important to the SO/HO customer. The OfficeMax OnLine Special Order Center in-store kiosks allow customers to order over 20,000 special order products through an easy to use touch screen system. In each facet of the OfficeMax strategy, the network infrastructure enables a more cost effective, convenient, and customer friendly shopping experience.

Data Warehousing and Decision Support -- Dayton Hudson Corporation (Minneapolis)

Dayton Hudson Corporation, one of the largest retailers in the U.S., operates Target, Mervyn's, Dayton Hudson's and Marshall Field's stores. Dayton Hudson Corp. recently decided to implement a standardized approach for the data warehousing systems of their three divisions. The soon to be deployed FDDI fiber network will improve vendor negotiation through order consolidation, allow early spotting and validation of fashion trends through analysis of corporation-wide sales data, and increase customer value by lowering overhead and increasing availability of popular items. By taking a multi-division integrated approach to data warehousing, the

retailer can leverage its knowledge of the customer across all of its operating companies.

Judging Panel Comprised of Industry Experts

The judges for the awards selection were comprised of senior information technology executives experienced in implementing and operating networked applications in retail environments. The judges for 1997 were:

Dave Ellis, director of information services, The Home Depot

Bruce Fox, editor & associate publisher, RT Magazine

Stuart Rhea, vice president for technology, Safeway

Jane Rice, chief information officer, Ross Stores

David Shields, senior consultant, network planning, Sears Roebuck

Barry Shuler, vice president for technology planning, Marriott

International

Dick Silvers, chief information officer, Tandy

The judges evaluated a field of nominations based on the criteria of originality, difficulty, success, importance of the information technology, and benefits to the organization and consumer. The objectives of the RNIA are: To recognize retailers whose passion for creativity and innovative use of technology has created value in new ways for the consumer; and to set the benchmark for innovative thinking that will promote further innovation in retailing..

"The judges, representing a broad cross section of retailing, brought a strong diversity of perspectives to the nominations being evaluated," said Jeff Siegel, 3Com worldwide retail industry group manager. "They clearly appreciated the degree of creativity, risk taking, and top management support required to bring the ideas embodied in the nominations to fruition."

About 3Com 3Com Corporation has helped more than 50 million people gain access to critical information through high speed networks. Designed to serve large enterprises, small offices and homes, 3Com products provide a scalable architecture to meet the immediate and long term connectivity needs of today's users. With research and development on three continents, 3Com is one of the data networking industry's largest and fastest growing companies. 3Com enabled networks are deployed in over 100,000 retail stores and hotel properties for their point-of-sale and in-store networks as well as for building their retail enterprise intranets which connect their stores, distribution centers, and regional and corporate offices. The company's innovative marketing, sales and support simplify communication, optimize network reliability and protect customer investments.

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12792289

**INTERNET CHRISTMAS SHOPPERS AT RISK FROM CREDIT CARD FRAUD**

Times of London (TL) - Sunday, October 19, 1997

By: Debbie Hill and Peter Birks

Section: Features

Word Count: 373

**TEXT:**

VISA and Mastercard holders who use a Christmas-shopping site on the Internet are potential victims of serious fraud. A lax security procedure could result in thousands of pounds being charged to accounts, without cards even being stolen.

The e-Christmas site goes live on the Net on November 3. It allows surfers to buy goods **online** and have them **delivered** to an **address** other than that of the cardholder.

Buyers do not need any proof of identification, such as date of birth or their mother's maiden name, as is normally required with over-the-phone transactions. All that is asked for is a billing address, a shipment address and the Visa or MasterCard number.

This means a corrupt shop worker, where goods require delivery, could note credit-card numbers and billing addresses. Goods could be delivered to a "dead-letter" address and the cardholder would know nothing of the purchase until the bill arrived. The Christmas web site is sponsored by Microsoft, Hewlett-Packard and UPS. Retailers from nine European countries will be offering products through the scheme.

More than 50 retailers are already taking part, including Jaguar in Britain, Nestle in Italy and BMW in Germany. Hamleys, the London toy emporium, is also offering promotions on the site.

The site is targeted at customers who want to select and pay for Christmas presents over the Net and have the goods delivered to friends and family who live abroad. But Wynn Evans, spokesman for the Association of Payment And Clearing Services (Apacs), said: "There should at least be some identification checks made by the company before it allows a **purchase** to be made, especially if the **goods** are not going to the cardholder's **address** .

"We always advise credit-card holders to be very careful when giving their details across the Internet as they can be intercepted on the way."

The sponsors said that they decided not to ask for proof of identification because they did not want to introduce extra complexity to the buying process. "What we wanted to do is keep it simple," said Jolanta Pilecka, marketing manager at Hewlett-Packard. "The site is connected to a 'hot-card' file so it will be declined if it has been reported stolen."

DIALOG(R) File 621:Gale Group New Prod.Annou. (R)  
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01440669 Supplier Number: 46809324 (THIS IS THE FULLTEXT)  
**Kao Infosystems Launches I-Reg, Integrated Registration, for Customer**

**Focused Marketing**  
PR Newswire, p1017NEMTH03  
Oct 17, 1996  
TEXT:

Turns anonymous buyers into valuable, known customers

PLYMOUTH, Mass., Oct. 17 /PRNewswire/ -- Kao Infosystems, a subsidiary of Kao Corporation, is re-engineering the customer registration process so that software publishers, hardware vendors and companies doing business on the Web can build mutually beneficial, long-lasting relationships with customers. Kao is introducing an Integrated Registration Program (I-Reg), which consists of modular products and services that can be tailored to support a company's customer registration and other customer-focused marketing needs.

More than a basic product registration service, I-Reg provides an entire worldwide infrastructure of program design, database and registration services under the I-Reg umbrella. All services are integrated together and managed to create a seamless program for building long-term customer relationships, loyalty, and repeat business.

#### Helps Companies Move to Customer-Focused Marketing

This value-added service increases registration levels from around 10 percent to almost 40 percent, enabling client companies to build information-rich marketing databases about their customers. It also provides companies with an affordable method of direct, yet non-intrusive communications with their installed customer base for such purposes as upgrade offers and with surveys, which can deepen the customer relationship. I-Reg services provide thorough, usable customer information and tailored communication to help companies move toward "customer focused marketing models."

Customer-focused marketing takes a company from merely selling products to actually organizing its efforts around meeting customer needs. Customers become more than a name and address for an upgrade mailing, they become long-term corporate assets.

"Distribution channels make it difficult for companies to know anything about their customers," says John Brush, executive vice president at Kao Infosystems. "We provide tools for companies to gather critical information about their customers so they can market more effectively. We help them predict when to contact their customers, about what, and how much to spend doing so. Kao's I-Reg program extends a product registration into a customer relationship."

#### Current Customers are the Best Customers

Research shows it costs four times as much to get a new customer as it does to sell to a current customer. In addition, if a company knows the long-term value of a customer, it can make better decisions regarding how much to spend to market to that customer. I-Reg services offer an affordable way to communicate directly the valuable installed base of active buyers, collect customer profiles, and then integrate that data into a company's database for future mining.

#### Registration the First Step

Effective registration is the foundation for a strong, long-lasting relationship with customers. RegSend Basic and RegSend Custom, the two versions of I-Reg software, are leading registration applications that can be integrated into any software product or Web site. For companies that market internationally, Kao can address cultural, language and address standardization for 180 countries.

Once embedded, RegSend pops registration screens up for users to send data, either instantly by modem, or the electronic form can be printed and

faxed or mailed. Making registration this easy has been shown to increase registration rates exponentially.

#### Keeping Databases Useful is Next

Customer registration is only the initial step. Once a customer has completed and sent off a profile, keeping the resulting information in a single, useful and updated database is the necessary follow-through. Kao's I-Reg services link registration with other customer information. Upon receipt, customer data is "cleansed" by standardizing the address and catching any duplications or incomplete forms, or even completing the form with accurate customer information.

The I-Reg ReadytoMail service ensures that at any given time, a company's database will be clean, and ready to use for direct response marketing. In fact, Kao Infosystems will guarantee the deliverability of mail for clients who take advantage of the ReadytoMail service.

Embedded I-Reg software can also be used to conduct customer surveys, offer upgrades, and receive other customer feedback. It has capabilities for capturing and transmitting data, printing screens, and detecting hardware and systems software information (which can be done at the customer's discretion).

"Improved data collection techniques are just the beginning, information is only as good as it is usable," says Brush. "Companies need an affordable method for effectively capturing and maintaining customer data, so they can transform the information into a useful business tool to market product upgrades and sell other products through direct marketing."

Once a database is in place, Kao's I-Reg services' customer-focused marketing methods help companies analyze and segment customers into different market segments, and develop contact strategies to contact customers at the right time with the right message. Kao offers both standard and custom reports for any slice of the registration base. I-Reg's flexible, open architecture allows companies to dynamically change the data collected without making changes to the database to generate reports on the new data. User data can be reviewed both statistically and graphically.

#### Product information and pricing

RegSend, available now, includes RegSend technology modules (DLL's for Windows, code resources for Macintosh, and linkable libraries for DOS); a RegSend annual licensing agreement; sample software applications to demonstrate registration set-up; and complete documentation for easy installation. The RegSend Custom Software Developers Kit also includes the source code for customizing the standard interface of registration screens (Windows and Macintosh only). A Web version will be available in 4th quarter, 1996.

RegSend Basic pricing varies depending on the registration volume that a company experiences. Additionally, a monthly program fee is also charged. With program design fees and user interface programming costs, RegSend Custom carries additional fees of approximately \$10,000 in most cases. I-Reg database maintenance services are priced according to the extent of the services required by the client.

Plymouth, Mass.-based Kao Infosystems is a subsidiary of Kao Corporation, a \$9 billion consumer products company located in Tokyo, Japan. Established in 1986, Kao Infosystems has a global network of research laboratories, production plants, and service and support organizations in 25 countries. Kao Infosystems provides a full range of client services including online registration and customer-focused marketing services, software manufacturing and distribution. For more information, contact the company at Kao Infosystems, Inc., 2440 San Ramon, Suite 200, San Ramon, CA 94583. Telephone: 800-211-3632. Fax: 800-211-7755,

SOURCE Kao Infosystems Company

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10/17/96

/CONTACT: Denise Thomas of Kao Infosystems, 800-211-3632, or Susan

Majerus of Parker LePla, 206-285-5280/  
/Kao press releases available through Company News On Call by fax,  
800-758-5804, ext. 108799, or at <http://www.prnewswire.com/>

CO: Kao Infosystems Company  
ST: Massachusetts  
IN: CPR  
SU: PDT

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7999 10/17/96 15:14 EDT <http://www.prnewswire.com>  
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01531053      SUPPLIER NUMBER: 12535791      (THIS IS THE FULL TEXT)  
**Tame the tiger: electronic forms, coupled with workflow management and support for client computers, can increase worker productivity.**

**(Applications)**  
Poulios, Nan  
LAN Magazine, v7, n9, p77(5)  
Sept, 1992

TEXT:

ELECTRONIC FORMS, COUPLED WITH WORKFLOW MANAGEMENT AND SUPPORT FOR CLIENT COMPUTERS, CAN INCREASE WORKER PRODUCTIVITY AND EFFECTIVENESS

The concept of the paperless office has been a longtime prediction of computer visionaries. LANs and e-mail were the early tools that had the capability to end printed interoffice memos and correspondence. Electronic forms were destined to tame the paper tiger.

Forms are necessary to every organization. They provide permanent records of the daily functions and transactions, and they reflect and manage the flow of work. Forms provide employees with the necessary information to perform their tasks.

Providing information to employees is also the aim of computers, so it should follow that forms would be automated by computers; however, such is not the case in most organizations. While paper files were readily entered into databases, accounting ledgers transferred to spreadsheets, and documents prepared in word-processing programs, automating forms has not proceeded as fast.

For many years, organizations have attempted to reduce the amount of paper they create. The federal government has even instituted a paper reduction act. However, the majority of these organizations still use paper forms, largely because very few people understand the true concept of electronic forms. No standard definition of an electronic form exists yet; misconceptions abound. True electronic forms should meet the following requirements:

- \* Excellent graphic and drawing tools;
- \* The ability to incorporate existing data from various sources;
- \* Intelligence with calculations;
- \* Routing over a network;
- \* Consistency with existing workflow management;
- \* The ability to print the same form on different printers;
- \* The capacity to be a front end or a back end to your application;
- \* Cross-platform support; and
- \* Ease of use.

GENERATIONS OF PAPER

Evolution originated with the paper form. That first generation of forms was filled in by hand. Many improvements have been made to these forms, including carbon interleaved and carbonless forms. Separate forms have been incorporated into one to reduce handling. However, these forms are still filled in by hand.

If handwritten forms have served their purpose in organizations for many years, why should they be abandoned now? Filling in a form by hand is time consuming, and repetitive data must be re-entered. Consider a personnel file. How many times does the employee name, address, telephone number, and social security number appear? Repeating this information is not only inefficient but also predisposed to mistakes. Regardless of these

inefficiencies, most organizations still use first-generation forms.

With the advent of computers, a second generation of forms was born. These too are preprinted paper forms. Instead of handwriting the forms, though, the data was printed on the forms from a computer program.

Paper form layouts were designed to coincide with the print positions of programming output. Repetitive data was entered from a database and many organizations used fast, efficient line printers. Now the inefficiency of handwriting a form and entering repetitive data has been solved. Why not stop here? Because preprinted paper forms are expensive.

#### AT WHAT COST

Paper forms are a billion dollar industry. Printing is only a minor percent of the cost. Companies' purchasing departments spend much time quoting, ordering, and determining specifications of printing orders. Organizations with many preprinted forms often employ people whose only task is ordering and managing forms. The lead time for printing a custom form is usually three to seven weeks. Organizations must plan for this lead time and determine form usage to ensure a constant supply of forms.

To ensure uninterrupted forms supplies and to take advantage of quantity discounts, many organizations warehouse their forms. Storing incurs expenses not only in the price of the square footage but also in shipping, insurance, employee, and management costs. These expenses constitute pre-filling costs.

Post-filling costs are also incurred. Once the form has been filled out, copies are often sent to different departments for record keeping. Employee time is lost delivering these forms. Storing multiple copies of the same document in different departments requires extra filing space. File cabinets and floor space are costly. More expenses are incurred when these files are archived.

In view of today's economic conditions, most businesses are trying to pare expenses and to operate more efficiently. Second-generation paper forms are not an efficient choice for these organizations. Yet, most companies still order paper forms and have a typesetter do the layout.

The first step in manufacturing these preprinted forms is design, and

many organizations have used electronic forms to eliminate this step. The third generation of forms is the converted typeset masters into computer graphics and printing the masters on a laser printer.

This generation of electronic forms does not meet the definition of a true electronic form. Most of the costs associated with preprinted forms are still incurred.

#### MERGING DATA AND GRAPHICS

Improved computer graphics and laser printers have led to a fourth generation of forms often called electronic forms. This generation ranges from high-speed laser printers merging mainframe data down to home offices merging graphics and data on inexpensive laser printers and personal computers.

LANs enable data to be sent from various applications on the network to a print server. Forms and fonts can be downloaded as a macro to a laser printer, resulting in fast output. This new technology has saved costs associated with purchasing and manufacturing forms. The need for storing forms has been eliminated, and companies won't run out of them. Yet, even this generation does not truly define an electronic form. It is really only a back end for an application that merges data and graphics.

Without any inherent intelligence, no electronic signatures exist, no column totals are possible, and no serial numbering exists. All data must be keyed directly into the application. Users familiar with completing forms by hand often find switching to data-entry screens and computer applications confusing. If the user is confused about the process, data will often be entered incorrectly and slowly.

Merging graphical forms and data often requires sophisticated programming knowledge. This need hinders the efficiency of the electronic

form, too. Exchanging the time an organization expends in ordering and warehousing forms for development time to merge graphics and application data has not saved any real costs. Another shortcoming of this generation of forms is the need to still be printed on paper and routed.

#### INTELLIGENT FORMS

The next evolutionary step is the fifth generation, which incorporates intelligence into the form. You can not only merge data and graphics but also add intricate calculations and formulas to a form. You can provide database lookups and data validation to existing data files. Electronic signatures—even encrypted ones that can lock other fields--can be placed on forms.

For example, an employee fills out an expense report form. The last step would be to electronically sign the form. This form could be designed in such a manner that this signature locks the total fields. Now this data is saved and can only be unlocked by the original signer.

Intelligence can be used to ensure that valid data is entered in a form. When a form is incorrectly filled out and processed, much valuable time is lost correcting the error. By using the calculations available in form design applications, designers can make a field mandatory, limit the range of an entry, and allow only one selection from a list of items.

Consider the possibilities of intelligent forms. An employee takes a phone order for merchandise. The customer name is entered, and the **address** and terms are automatically filled from a customer **database**. He can enter a part number on the form and the description, price, weight, and packaging quantity are filled in automatically. The quantity **ordered** is entered, and the form automatically totals these line **items**. The employee next checks a box to indicate the **shipping** method, and the form calculates the **shipping** costs.

The employee tries to save and print the form. An error message appears notifying the employee that a payment method was not entered. This error can be corrected before the order is sent to the shipping department, where the error is magnified.

Ease of use is another benefit this generation of electronic forms offers. Field-by-field help can be added for the end user. Many of these programs are WYSIWYG. The end user will be able to migrate from filling paper forms to filling electronic forms easily if the form appears on the screen as it was on paper.

The ease of use for the designer must also be taken into consideration. Forms designers are not programmers. They must be able to electronically design a form and add some level of intelligence without possessing a programming degree. Of course, advanced capabilities should be included for those sophisticated enough to use them. This fifth generation of forms meets these standards.

However, this generation still does not meet the originally stated requirements: Routing is missing. Multiple copies are still being printed and stored by different departments.

#### ELECTRONICALLY ROUTED FORMS

A sixth generation of forms can now route electronic forms over a network. JetForm (Leominster, MA) has a product called JetForm Filler for E-Mail that automatically routes form graphics, fonts, and data using Lotus' cc:Mail for Windows or the DOS version. An end user fills out a form and simply clicks a mouse on a button entitled "Send."

The user can send either only the current record or all records. If the recipient doesn't have the form file or fonts, they can be sent along with the data. cc:Mail will also accept a text message as an attachment to the form. JetForm has made this process seamless for the user.

The routing process can also be made intelligent. A calculation can be included in the To: field that increases by one each time the form is sent. Each resulting number can be tied to a mailbox address.

A purchase requisition can start with the first recipient being the

requester's supervisor. Once the form is filled, the supervisor's mailbox is automatically entered into the To: field. Once the supervisor approves the requisition, the address is automatically updated to the purchasing department and sent there. A "denied" field could be added to the calculation to forward the form back to the originator if the supervisor did not approve the purchase.

Electronic forms can follow the same paths as paper. By routing electronically, you save the time and expense of physically distributing the forms. This sixth generation of forms has merged electronic forms and work-flow management.

With the sixth generation of forms, most of the requirements in the definition of electronic forms has been met. Yet to be truly efficient, advanced workflow management and cross-platform support must be incorporated into these forms. This level is beyond the scope of packaged forms programs. The forms package you select must be capable of providing hooks to this level of customization.

#### FORMS AND THE ENTERPRISE

Many large enterprise networks do not consist of one computer architecture. IBM mainframes, PC networks, VAX, Unix, and others are generally present. If a form is to migrate from paper to electronic, all platforms must be supported; employees should not have to switch environments.

For instance, JetForm supports Windows Dynamic Data Exchange (DDE) and allows hot links to other DDE programs. Gupta Technology's Quest, a Windows-based database front end, also supports DDE. Quest can link networked PCs and mainframe SQL database applications. Users can enter data into forms in their own environments and use JetForm as a back end to print them.

Other possibilities exist with other cross-platform applications and interfaces. To be useful, these forms must be available to everyone in the organization. They must be able to be printed to different departments to be a true back end.

Conversely, electronic forms must function as a front end for an application if necessary. Users can input data into an electronic form, and the application behind the form will be totally invisible. One application that uses forms as a front end is ForMastr, which is a forms management application that manages paper and electronic forms from VIP Business Computer (Rochester Hill, MI). No data-entry screens exist, and all data is entered directly into an electronic form. The database lookups and application are invisible to the user. The user selects forms from a set of onscreen icons. This front-end capability eases workflow management considerably.

Forms are a reflection of workflow, and they should manage workflow through an organization. Form fill-in can be one selection from a customized user interface. Electronic forms can be arranged by purpose. For example, all personnel forms could be accessed by clicking on one icon, and all expense forms could be accessed by clicking on a different one.

Suppose an employee wants to fill out an expense report. She selects the expense report from icon. But perhaps she needs to enter some expenses in an Excel spreadsheet. So before the electronic form is opened onscreen, the spreadsheet appears, and she performs the necessary tasks. She then selects the form, and it is opened onscreen. Any hot-linked data is inserted in the form, and she finishes completing the expense form.

The form is automatically routed to her supervisor for an approval. She might even add a note to the form reminding her supervisor that these expenses are higher than normal because travel was to New York City.

Later, the supervisor could electronically sign the form and forward it to accounts payable to be processed. Never would this form be printed, yet the record could be accessed at any time. This whole process was initiated by selecting one icon from a screen. This scenario represents electronic forms and workflow management working with existing technology

at the optimal level.

Electronic forms that include intelligent calculations, drawing tools, network routing, support for a variety of printers, the capacity to act as a front end or a back end to an application, support for several platforms, and ease of use when teamed with workflow management can help an organization to increase its productivity and effectiveness.

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01346241      SUPPLIER NUMBER: 08102662      (THIS IS THE FULL TEXT)

**Feedback. (letter to the editor)**

Johannessen, Vidar; Hall, Douglas E.; Korostynski, Al; Schneider, Gerald J.  
Data Based Advisor, v8, n2, p10(1)  
Feb, 1990

TEXT:

Feedback

S.O.S.

I recently developed a dictionary generator in FoxBASE+. It's aimed at translators and other people who need instant access to words. The problem is: My program doesn't fulfill all their needs because it can't pop up in the middle of a word processing session.

AShton-Tate's FrontRunner is probably what I need, but it only works with plain dBASE III PLUS code. The utility I need must run compiled FoxBASE+ code (to FOX files) that I can distribute with Fox's runtime module. It should also be able to paste records and fields into a word processor.

Is someone out there listening?

Vidar Johannessen Eidsvagneset, Norway

The Zip Code Dilemma

Karen Watterson's article, "Do You Make These Common Database Design Mistakes? Part 2" in the December issue repeats an error that's caused me and others endless problems. I hope this letter helps inform her and other database designers, without causing further difficulties.

In discussing normalization, she states, "Since there's a unique city/state for each zip code (92103 can only refer to San Diego, Calif.), you could use only the zip code in the address record."

Not true! I live in Chichester, New Hampshire, and my mail is addressed to me at Chichester, NH 03263. But 03263 is also the zip code for Pittsfield and parts of Epsom, New Hampshire. Worse, some parts of Chichester receive mail through the Concord post office, which is zip code 03301 and others through the Suncook post office, which is 03275. Further, Suncook isn't a town; it's just a village post office location from which mail is delivered.

A zip code is unique to a post office, not the town and state of an address! The relationship between a zip code and town/state isn't "one to one" or even "one to many"--it's "many to many." Some vendors of zip code databases conveniently overlook this when selling their **products**.

I've bought computer **products** from mail **order** firms using these types of **databases**. They take the **address** information, but their software **looks** up what it thinks is the correct town. The mailing label for me became "Lane Road, Pittsfield, NH 03263." UPS and the post office keep returning that item as "no such **address** ." No matter how often I called and said the **address** had to be "Chichester, NH 03263" the computer **database** overruled the salespeople.

It's okay to use a look-up table to find a default city/state for a zip code code, but you must let users overide the defaults.

Douglas E. Hall Infonomics Chichester, New Hampshire

Karen Watterson replies: Thanks, Paul, for setting me straight. I incorrectly stated that there's a unique city/state for each zip code. Your examples of zip codes spanning several cities (and one zip code spanning two states) show that zip codes aren't unique to cities. So, fellow database designers, beware!

Go Paradox!

I'm writing to request that you increase your Paradox coverage. I've subscribed since 1986. I've especially enjoyed the excellent Paradox column by Brian Smith. I also enjoy the many other articles. Please keep up the

good work!

I use Paradox as my primary database product and I'm not much interested in dBASE, its clones, or R:BASE. Given the rapid growth of Paradox as a database of choice by many, I invite you to consider increasing the coverage of the program. Brian Smith has done a great job, but he can't do it alone; Paradox is a very powerful, multi-faceted product and deserves wider coverage.

Al Korostynski Microcomputer Analyst LEGO Systems, Inc. Enfield, Conn.

Ed.'s note: Great idea. That's why we decided to increase our coverage of your product of choice starting with the December issue. (And forgive us if Brian Smith isn't included this month. He'll be back in time for the March issue.)

What's the Deal?

I'm an avid reader of your magazine and part-time programmer in dBXL/Quicksilver. But the last few issues lack dBXL/Quicksilver articles and columns. They're exceptionally useful tools with very unique features. Your past articles on AUTOMEM and windows were great, but don't stop there. If there's a problem with the products, please let us in on the secret. For now though I look forward to more articles about these great products.

Gerald J. Schneider APO, New York

Ed.'s note: We're at work on some as you speak.

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**Nutshell Information Manager. (evaluation)**

McQuillan, John M.

Modern Office Technology, v29, p111(2)

Aug, 1984

TEXT:

User-friendly. Ase of use. Ergonomics. Menu-driven. Sometimes the buzz-words get to be too much, and you wonder if they mean anything at all. But, now and then, a product comes along that does represent a real step forward in ease of use. Sometimes buzz-words do mean something.

The Nutshell.sub.TM software product from Leading Edge Products, Inc., Needham Heights, MA is billed as an "Information manager." What does this mean? Nutshell is actually a simplified and streamlined database management system (DBMS), though Leading Edge carefully avoids this computer terminology in all its advertising and documentation for the product. The most impressive aspect of Nutshell, in fact, is that it can used by people who would never be able to use a conventional DBMS.

First of all, "Information manager" is a tool to lehp organize a collection of information (a "database," in computerese) which is usually growing and changing over time. For exmaple, Nutsell could be used by a real estate agent to keep track of house and apartment listings, or by a personnel department to keep a record of each employee's salary history, benefits, and skills. In fact, Leading Edge uses these two examples in the demonstration and instruction disks it provides with the system. The demo, which can be seen at local computer sotres, runs by itself, showing how the personnel department can find employees by name, by type of skill, or by any other information stored for each person. New employees can be added, people can be dropped from the file, an employee's record can be modified, and so on. One typical use of such a system is to prepare "reports," which are lists of "records"--in this case employees--that satisfy certain criteria--a certain salary range, say--and printed in a certain way on a page. Nutshell is capable of very flexible report preparation and generation, and its demo presents an excellent overview of the system in under ten minutes.

The instruction disk is very well designed. It takes you through the scenario of the real estate agent, telling you what to type in at each point (unlike the demo, which requires no typing at all). If you type the wrong key, it beeps quietly and waits for you to get it right. You are able to browse through a file of real estate listings for Cambridge, MA--JUST where my office is, by coincidence! (The creators of Nutshell, Nashoba Systems, also are located in Cambridge.) You can find houses for sale with fireplaces, costing less than \$90,000 (try doing this for real in Cambridge!), and can display them in various ways. Like the demo, the instruction disk can be run very quickly, in five or ten minutes for each of the three segments.

What these disks show is that Nutshell is exceptionally easy to use. The entire system, with its supporting documentation, is targeted at persons who want a simple system. Several steps have been taken in their behalf:

The manual is organized to make it easy for beginners. It has three sections, on Essentials, Screens and Options, plus an Appendix. The Essentials section gives enough details so that even those with little experience with personal computers will be able to follow the instructions. The more advanced material is also presented very clearly, and with an emphasis on exactly what to do and when to do it.

The Instruction Disk is very well assembled; you may find you can use the system directly from there, and bypass the manual.

A Keyboard Guide is provided. Placed over the keyboard of your IBM PC, it shows you the actions for all the control keys.

The system itself is menu-driven, with just a few choices at each point (typically about 6-8), displayed at the bottom of the screen. In addition, there are very few different screens to learn in the whole system.

The system is flexible in its command style. For example, you can go to the menu by pressing F2, then move your cursor to the desired action, and press F10. Or, you can press F2, then the first letter of the command. Or, if you're a bit more expert, you can type "al-x" where "x" is the first letter of the command, and bypass the F2 step altogether.

You can get help at any time by pressing F1. A context-dependent help screen "pops up" over part of the full screen.

You can cancel the last action by pressing "Esc" at any time. The importance of the last few points is that Nutshell provides a uniform user interface at all times. F1, F2, F10, and ESC always means the same thing. The same is true for the screen movement keys.

The other successful aspect of the human interface is its simplicity.

There is very little to it. Only three function keys are used. There are only a handful of menu options. Many actions are taken automatically for you. For example, when you define the fields in a record, Nutshell sets up a layout for them, and treats them all as keys (you can refer to them in sorting the file). All words in a field are indexed (you can refer to them in a search for specific records). There are no limits to field size, etc. There is only one DOS file for your data, not ten or 20 as with some DBMS packages.

All this ease of use comes at a price. There is a classic tradeoff in the design of any interactive computer system--simplicity vs. functionality. Powerful systems usually are not easy to use. Simple systems usually are not very capable. There are many things that Nutshell cannot do that more powerful database management systems are designed to do routinely. But that is like saying that a passenger car can't haul as much firewood as a pickup truck. Of course it can't; the two products are designed to do different things for different types of customers.

Nutshell is restricted to working with one file at a time. For simple applications, this is entirely adequate. For complex applications, you might wish you could use several at once. For example, in an order processing application, you might keep customers' orders in one file. You might like to have your product catalog in another **file**, and your customer records (**address**, credit rating, et al) in another **file**, making it possible to change them independently. Then, when processing **orders**, you could look up the **product** and customer information in the other files. Using Nutshell, you would have to keep all the data in one file.

Another limitation is Nutshell's speed. It is quite adequate for files of several hundred records. For example, you can find a unique record out of a 1,000-record file in two seconds. But if you have thousands or tens of thousands of records, you might want to choose one of the leading DBMS packages for PCs, which can find a record in a 10,000-record file in under two seconds.

It comes down to this: Do you want an information manager for your own personal records, such as your business contacts (name, address, phone number, other data), your projects, sales prospects, customers, etc? Nutshell can do the job for you, and you won't have to waste much time learning the system. It sells for \$395. Do you want a system to automate the record-keeping of your whole department or small business? You are better off with a true DBMS like dBase, rBase, Knowlegeman, InfoStar, and others. But they cost more.

If you are interested, Nutshell runs on IBM PCs and compatibles with 256K RAM and one disk. Several printers are supported, including the IBM/Epson, and the Leading Edge/C. Itoh series. As an important practical

aid, there are utilities for bringing existing data into Nutshell from ASCII files, and for transferring information from Nutshell to other programs by ASCII files.

CAPTIONS: At a glance. (table)

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